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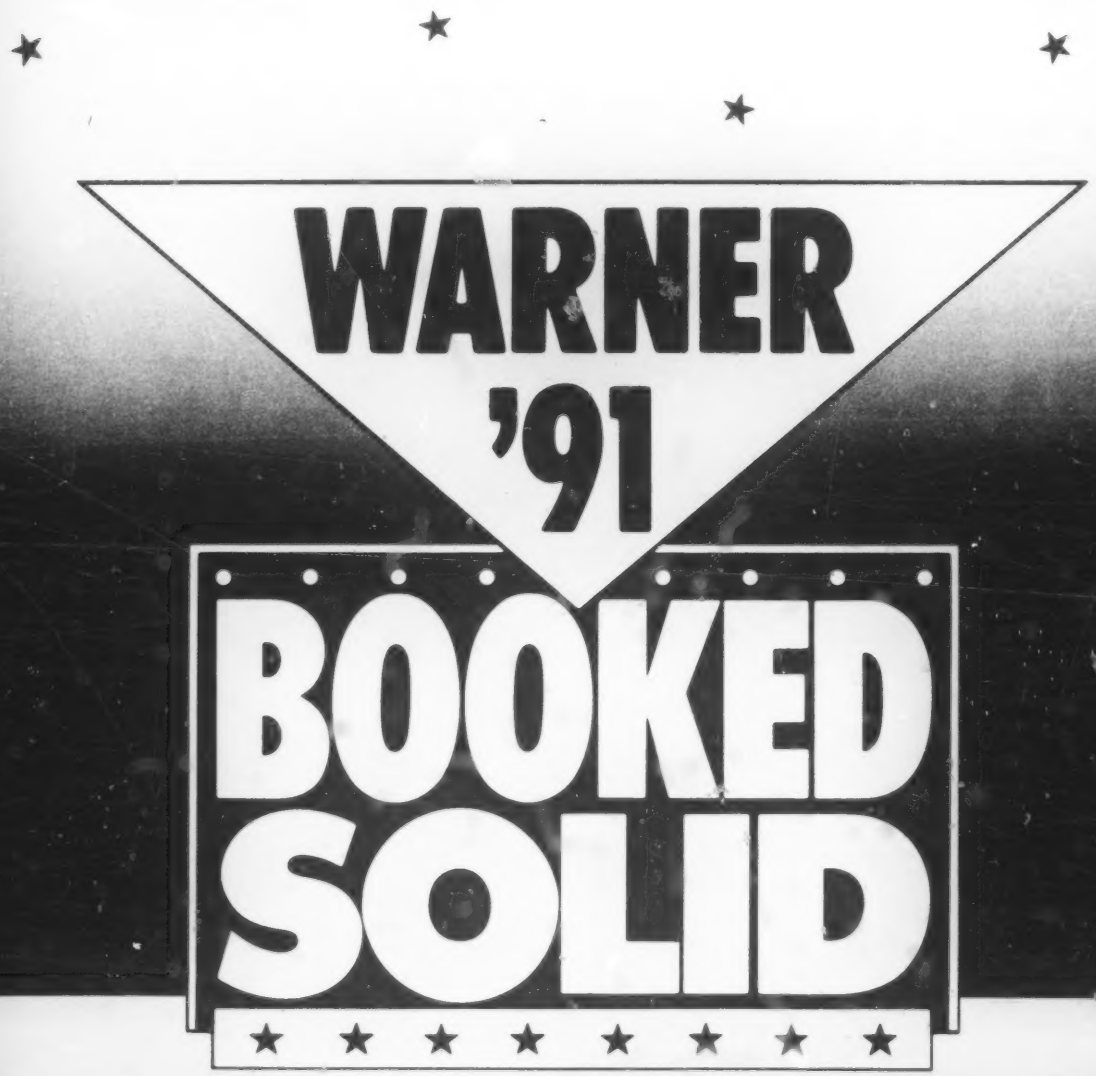

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Publishing for Literacy

The national illiteracy crisis, increasingly recognised by Washington and the private sector, offers great opportunities for houses that can offer new approaches

BY BARBARA PRETE

Since *PW*'s last special report on the subject in 1985, the state of literacy in America has been recognized as a national crisis. Five years ago, there was comparatively little awareness that a problem existed; today, a major literacy bill still promises to emerge from Congress as legislation (see p. 34). And where there were formerly but a handful of companies publishing for the literacy market, there are now more than 200.

Two major developments within the past five years have brought the issue to the headlines and heartlands. First is the First Lady's active commitment to the concept of family literacy (see *PW*, "Family Literacy," May 25). The second is more disturbing—a corporate America facing increasing competition from abroad but lacking the educated, technically skilled work force it needs to meet the challenge. Former Secretary of Labor Elizabeth Dole summed up the problem: "The basic skills of our work force are eroding at an alarming rate. Many of our workers are unready for the new jobs and the new realities of the 1990s. We face nothing less than a work force crisis." This second development has brought workplace literacy to the forefront of a national education effort that is reaching out beyond traditional resources for solutions.

The figures: The Business Council for Effective Literacy (BCEL) reports that 75% of the adults who will be employed in this country in the year 2000 are now at work. At present, 23 million of these people read at or below an eighth-grade level; within this group, an additional 11–14 million read at or below a fourth-grade level. While 40% of all new jobs created today are for people with low skills, this ratio is projected to fall to 27% by the end of the decade, when most new jobs will probably require some post-secondary education.

The population growth rate is expected to continue to decline, shrinking the pool of new young workers. Of those who do enter the work force, 80% will be nonwhites, immigrants and/or women—traditionally, the most disadvantaged and least-skilled parts of the population.

At present, there is no precise measure of what kinds of skills are necessary for specific entry-level jobs now or in the future, but it is becoming apparent that as technology advances, jobs that today require a middle level of skills will be among the least-skilled occupations by the end of the decade.

Much of the new attention on the national literacy crisis is focusing now on workplace literacy, for good reasons. The growing disparity between the rising educational requirements of employers and the educational level of the work force has already begun to hurt U.S. businesses. As they become more pressured by international competition and in turn pres-

***Corporations** offer widespread literacy programs.*

***Photos** here and on p. 28 are from Time Warner.*

sure Congress and the government agencies for help, they are beginning to call for a national employment policy. Its purpose: to set goals and implement a system to retrain or upgrade underemployed, functionally illiterate adults. Without such a policy, BCEL's Gail Spangenberg believes, moving forward is all but impossible.

Defining the Challenge

Americans were shocked when Jonathan Kozol, in his 1985 bestseller *Illiterate America*, claimed that America was no longer first but 39th in literacy among the nations of the world. The public and private sectors responded by initiating studies to determine the extent of the problem. Results of many of these studies have been announced during the past few months, providing astonishing information. The literacy crisis—its range and depth—is turning out to be multiples greater than was suspected even a year ago. The news affects every segment of our society and bodes ill for the nation's economy. A sampling of recently released reports spells out some of the effects of illiteracy on the business community:

- "In companies ranging in size from 51–10,000 employees, 92% employ workers who lack solid basic skills. 70% of such companies do not provide any form of basic skills training."—Report of the Commerce Clearinghouse and the Society for Human Resource Managers, 1990.
- "Most companies are concerned about illiteracy among their workers and expect the problem to get worse. Most don't currently test for reading or math skills."—Conference Board Survey of 1600 manufacturers and service firms, 1990.
- "Only 16% of the nation's 500 largest manufacturing companies, 500 largest service firms, and 200 largest privately owned companies are satisfied with the educational level of new employees—and this after having to interview 7–8 applicants to find one acceptable for employment. Personnel directors claim that many of those hired require too much training to ever become effective."—A study conducted by the National Alliance of Businesses.

The intention of most of the major new reports is not to place blame but to offer hope and a new direction. Many of them recommend offering incentives to encourage private sector participation. One of the most significant of these reports, the Commission on the Skills of the American Workplace's "America's Choice: High Skills or Low Wages," concludes its list of recommendations: "Boldly executed, it [the implementation of these proposals] has the potential not simply to put us on an equal footing with our competitors, but to allow us to leap ahead, to build the world's premier work force."

The major challenge to America comes from abroad, according to this report. In preparing it, a prestigious group of corporate, union, education and government leaders examined the links between education and economics in Japan, Germany, Sweden, Denmark, Ireland, Singapore and the U.S.

"The foreign nations studied . . . insist that virtually all of their students reach a high educational standard. We do not. They provide 'professionalized' education to non–college-bound students to prepare them for their trades and to ease their school-to-work transition. We do not. They operate comprehensive labor market systems which combine training, labor market information, job search and income maintenance for the unemployed. We do not. . . . They have national consensus on the importance of moving to high productivity forms of work organization and building high wage economies. We do not."

By the year 2000, only one in four jobs will be low-skilled.

The report rejects mere maintenance of the status quo. Its recommendations include a new educational performance standard to be met by all students by age 16; a comprehensive system of technical and professional certification, with associate degrees for the majority of workers in all service and manufacturing occupations; incentives and assistance to employers, both to invest in further education and training of their workers and to pursue new advances in high productivity organization.

Echoing "America's Choice" is a report just released by Congress's Office of Technology Assessment and undertaken at the request of the Senate Labor and Human Resources Committee, the House Committee on Education and Labor and the Senate Finance Committee. Recommendations include training and technology assistance to benefit both the firm and the individual worker's career advancement. It would help firms set up training consortia; expand technical assistance to trade associations and other industry groups; consider a limited tax credit for private sector training; and phase in a payroll-based national training levy.

The literacy challenge is fostering much self-scrutiny and the promise of a new order. "From Gatekeeper to Gateway: Transforming Testing in America," by the National Commission on Testing, recommends that the whole enterprise of testing be overhauled and subjected to greater public accountability, and that "research and development" programs be expanded to create assessments that promote the development of all our people.

The Educational Testing Service (ETS) is two years into a three-year project to determine the skills most likely to be needed by the nation's fastest growing industries in the year 2000. Covering a range of functions in five specific entry-level jobs that are common to many work environments, the purpose of the study is to lay the groundwork for developing appropriate testing and instructional materials for banks, insurance companies, manufacturing, health care services, government and other concerns, large and small.

The Business Response

Although business has long invested in staff development, it has almost always concentrated on upper-line staff, ignoring lower-level employees' potential for advancement. As the extent of illiteracy in America, including its effects on business-as-usual, has become more apparent, corporations have offered widespread and varied responses. Every issue of BCEL's quarterly newsletter is chock-full of announcements of new corporate programs. Aetna, for example, is dealing with the work force crisis in the insurance industry by identifying an "alternate work force"—women who either have been out of the job market for some time or are poorly educated, minorities, unemployed youth and high school dropouts, disabled adults. Ana McCormack, director of the two-year-old program, explains the com-

pany's rationale: "We realized that if we worked with the changing job market demographics now, Aetna would be a more effective company in the years ahead."

Although a glance at the BCEL newsletter might give the impression that a bandwagon for literacy is on the move through corporate America, editor Gail Spangenberg says that most of the business community still sees literacy as a public responsibility.

Recognizing that government leadership is crucial, Mississippi governor Ray Mabus set up a Commission on Work Force Excellence. The group includes representatives from more than a dozen companies in the state. Charged with developing policies that would ensure the state's future competitiveness, it sought new ways for public and private sectors to work together. Following its recommendations, the Mississippi state legislature broke new ground when it approved a 25% tax credit to any employer providing basic skills services to help workers either function better in their jobs or advance within the company.

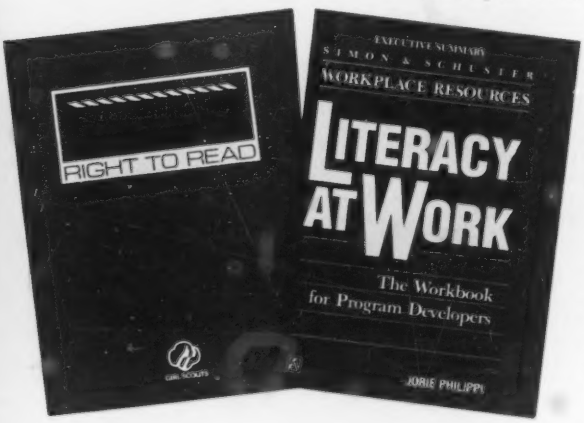
The Marketplace for Publishers

Literacy professionals agree that there is a large market for new adult education materials, and many describe the situation with a sense of urgency. Garrett Murphy, New York State director of adult education, warns that "if literacy is not a flash in the pan, if it is to continue to be important, we *must* be successful. Therefore, we need better ways to teach, and better materials." He defines three major literacy marketplaces:

First, there is the regular adult basic education market, for those seeking an elementary or secondary education. "Until two or three years ago, it was thought that the centrist view of teaching, in bite-size incremental pieces, would enable adult learners to make the necessary jump to generalizations. This is how we taught primarily, and it didn't work. So this approach is being challenged and seriously rethought.

"The second market focuses on a particular social or economic need. It can be as broad as that of the workplace, as specific as preparing to be a commercial driver. Now there is great interest in teaching by adapting instruction to the particular needs of the student. But it has its drawbacks. You can't always do it in a classroom with people of many different viewpoints, and some feel this contextual approach is just too functional and mundane, uninteresting and uninspiring. It needs work.

"The third and largest market is ESL (English as a Second Language). In many states at least half of federal and state money is spent here, a total of $500–$600 million." Murphy says that there is a tremendous need for ESL materials, and advises interested publishers to keep abreast of legislation and plan accordingly. "As immigration quotas rise with the new immigration bill, more and better ESL materials are required. And when you consider that the major reason for immigration is family reunification, it's family literacy materials that are needed. Then you've got to think about all these people needing jobs, that's workplace literacy materials."



Under the Welfare Reform Act, an increasing number of people will be enrolled in employment training programs. Education in basic skills is now a major component of the JOBS program, part of the Welfare Reform Act. Says Murphy: "A conservative estimate is that 60% of people in the JOBS program will need some form of basic skills assistance in order to move toward self-sufficiency. This was thought to be 20% until recently."

Judy Koloski is the executive director of the American Association for Adult and Continuing Education (AAACE), a private nonprofit service organization for professionals that has conducted marketing surveys. "We need solid materials in workplace and family literacy. A lot of expertise has been developed over the last four or five years, with enormous attention to workplace literacy programs. What is workplace literacy? Everybody's talking about it but few agree. What is the relationship of the family to the community, learning and reading? Publishers could become lobbyists for the basic research into these kinds of critical questions. They need people to buy books and they won't have people to buy books if even those that can read are aliterate." Koloski suggests publishers heed the civic need for literacy. "The ability of people to participate in democracy has diminished drastically. There is an enormous need to keep the undereducated generation informed about contemporary issues, so they can make decisions for themselves and their families. We need publishers to provide such materials. We've done a poor job laying out the issues that affect these people and their families—health, economics, the environment. As a result, we have children who find themselves victims because they have parents who don't know enough to help them."

Approaching the Market

Literacy professionals agree that endeavors in the field require a long-term commitment. They caution that the literacy market can't be merely dabbled in. Harvey Plotnick, president of Contemporary Books, is one trade publisher who, although lacking a background in educational publishing, has been very successful in this market. "Several publishers have entered the field and failed miserably, then called me to come work for them. It's not a difficult market to break into, it's just different." (See "Literacy Matters," *PW*, Oct. 12.)

Publishers and organizations have often entered the literacy field without a commitment to long-term investment, and without having done the research and development essential to success and profitability. The quick recycling of textbooks originally prepared for high school use or for other traditional adult educational uses is a much-cited example of this band-aid approach. Such materials have proven to be inappropriate for the new adult

learners' interests, and the publishers therefore haven't earned the money they expected. "No one is served," says Koloski, who is widely considered one of the foremost leaders in the field. "Traditional adult education principles and materials can be useful, but just as a start. Grade levels are irrelevant to today's adult learners, and they need more than a high school diploma that's unrelated to a job. There's been too little attention given to anything other than basic skills. The great need out there is for printed materials and computer-based programs—a basic core, generic enough to cut across institutional settings but practical enough to be useful in each place."

John Lawrence, coordinator of the Council of State Directors of Adult Education, concurs. "Materials need to be developed that are more relevant to the particular clientele. Those of us who've worked with adults over the years see that the better materials are developed in a different light than K–12. Many editors are becoming more sensitive to this issue and are asking for input from those on the front line."

Literacy programs custom-designed to fit a particular company's needs have proven too costly to develop. Each such program would entail analysis of the company's goals and expectations, individual needs assessments of employees, job task analyses, in which jobs are broken down into specific tasks in order to arrive at the reasons why errors occur. Then a curriculum would be designed to teach the skills necessary to correct these mistakes, a lesson plan for teaching specific skills and, ideally, a way to measure gains and productivity. "It's time-consuming and expensive," says Koloski. Garrett Murphy adds, "Everyone thinks only of the skills necessary for entry-level or bottom-level employees. How about thinking about raising the niche of those employees to accommodate new technology and ways of doing business? It's a policy that U.S. industry is adopting from other countries. How to communicate with team members and work with the public are part of work force literacy now."

In sum, if we have 25 million illiterates and expect yet more, if poor and underdeveloped nations can become competition on the basis of our work force limitations, if our federal and state governments allocate more funds for literacy in related programs, and if new and better materials are now in critical demand, there are great opportunities for publishers, particularly in the work force area.

Publishers' Progress

The literacy market is market-driven. Editors and publishers ask the buyer what is needed. "Most ideas come from the field—from authors, teachers, adult ed directors—it's a new network," says Rick Spenser, for 21 years the director of sales at Cambridge Adult Education. "In the case of the Army, which has an education budget of $90–$100 million or more, our salesmen went from the top down of the Washington brass and asked what their needs were. Then we either offered a product or developed a product for them. When their biggest problem was people's inability to read manuals, Cambridge's biggest seller was a video. program. Now the Army has switched from video to computers." Ten years ago, there were only two companies in this area of the education business, Steck-Vaughn and Cambridge; now there are more than a dozen.

Another is owned by Leo Prybylowski, a former school teacher and

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Literacy

adult ed director in Morristown, N.J. He runs Comex Systems, a multimillion dollar company, with his wife and son. Comex produces video lessons, test reviews and research/study programs for the military, libraries and other institutions. According to Prybylowski, six-figure sales are not unusual. "We sell the most popular education program in the military—you can't go on a base without seeing it." Comex will soon be setting up a learning center in Saudi Arabia. Asked how he gets large military contracts, Prybylowski replies, "We market from the base up, never from the top down." It all started 15 years ago with clients telling Pybylowski, then an adult ed director, what they needed. "First it was a crying need for GED [high school equivalency] and other test reviews. Next, librarians were looking for a program to teach newcomers how to use the library, the card catalogue, etc. In each case a videotape series was produced and sold to a waiting market."

WKTV, one of the largest public TV stations in the world, is part of the state education department of Kentucky. In the late '60s figures showed that more than one third of the state's population did not have a high school education and, moreover, was functionally illiterate. KTV, even then known for its commitment to adult education, developed a series to improve literacy. Then, according to Bill Williams, director of marketing (and chairman of Literacy Volunteers of America),

WKTV's Bill Williams developed a literacy series for television.

"We gave a copy of the program to every state adult ed director, free of charge. We broadcast it over the PBS system for one year, so others could tape it or whatever. That was how we validated the product of our $2 million investment." After that one year, the program could be aired only by license agreements. By then the demand was so great that KTV made back its money and then some, enough to invest in another series in 1985. This new set of programs was so successful that it is now being introduced in Spanish. At the end of its first year it will be brought out on video for business and industry. Williams expects another good return on investment.

Durkin Hayes Publishing of Canada, a company with $6 million in annual sales, found a niche in the market and produced its Read Along Audio Book series. The program, a favorite among adult literacy students, features tapes of well-known stars reading classic books and provides as well the word-for-word transcripts. Based on the educationally sound principle that the use of the spoken word in reading programs is effective in increasing comprehension and building fluency, the 51 titles sell well to libraries, high schools and literacy classes. Marketing rep Ghislaine Hewison reports that Read Along sales have increased by 10% annually since the line was introduced.

Jossey-Bass, the San Francisco–based educational publisher, prints 100 new titles per year and enjoys 30% growth annually. Literacy accounts for 15%–20% of this growth. Vice-president Alan Shrader sees a huge market in this country waiting to be tapped. "I think that most publishers are subject-centered and have shied away from literacy because it's too disparate. Jossey-Bass has built the company on a formula that makes sense of disparate markets. Our approach has always been to serve all the development needs of a market we've set our sights on. Right now we find it important to recognize the literacy practitioner—volunteer or whatever—as a professional and to publish for them, to help them develop their professional skills."

The nonprofit Literacy Volunteers of New York (see "Literacy Matters," Aug. 3) has begun publishing adaptations of trade books specifically tailored for the adult literacy market. According to Nancy McCord, LV-NY's publishing director, these books parallel another educational development, the whole language movement. "The books are aimed at integrating literature into the learning process." Observes McCord, "Most publishers already have books on their lists appropriate for this market. The many young adult series that include biographies, history, science and other nonfiction titles can be marketed to the new adult readers. Also there exist many adult trade books—biography, history and more—that are written simply. The market is there, the new readers are eagerly waiting for things to read."

The Co-Venture Approach

Partnerships among public and private, business and nonprofit sectors, are proving to be an efficient route to effective literacy publishing. "Co-ventures are the way into this market," says Benita Summerfield, president of Workplace Resources, a subsidiary of S & S. Her company joined the American Insti-

FEDERAL FUNDS FOR LITERACY 1990 (in millions)

Department of Education	
Even Start = Family Literacy	$ 24
Library Literacy	5.4
Student Literacy Corps	5.0
Family English Literacy Programs	5.0
Adult Basic ED (ABE)	158.0
McKinney Homeless	7.4
Nat'l. Workplace Literacy Literacy Program	19.7
National Demonstrations Programs	2.0
Total Department of Ed, excl. vocational education	235.0
Action Agency	
Vista Literacy Corps	3.0
Vista (may include include some $ for literacy)	N.A.
Department of Labor	
Most literacy funding in DOL comes via Job Training Partnership Act. It is difficult to separate out how much is for literacy. Best estimate is 5% of the $4 billion JPTA funding	200.0
Health & Human Services	
Family Support Act of 1988 JOBS Program (within Welfare Reform Act) includes free programs for recent immigrants—not necessarily literacy but related to citizenship	463.0

Source: Gail Spangenberg of BCEL

tute of Banking (AIB) to launch a curriculum that represents the nation's first industry-wide effort for entry-level employees.

It grew out of a special task force set up by the AIB, with assistance from the Business Council for Effective Literacy, to investigate on-the-job problems among commercial banks nationwide. With computerization and the accompanying proliferation of new products and services, as well as other market changes and developments, the traditional skills required of a banking employee had changed dramatically. Employee errors and shortcomings were affecting earnings.

When a survey was sent to 7000 member banks, 80% of the respondents reported that their employees had poor basic skills—tellers, for example, not able to balance their stations, entering wrong data, transposing decimal points, incapable of calculating interest because they don't understand percentages; customer service representatives unable to understand and interpret bank services and procedures because they can't read properly; others who use grammar incorrectly or are indifferent to customers.

After the new banking curriculum had been out less than a month, Workplace Resources reported sales to some 20 local banks and 30 local AIB chapters, and more than 300 banks had expressed interest.

A three-way partnership has been established among Berkley Publishing Group (New York), First Publishing (Chicago) and Classics Media Group (New York). Together they revived Classics Illustrated, the comic book series started in the 1940s. The publication has been given a facelift after 20 years of dormancy, and developed in cooperation with literacy groups so that it appeals to new readers.

Reaping Federal Funds

Scott, Foresman has tripled its sales in publishing for adult education over the past three years. Bought last year by HarperCollins, it now accounts for 25% of HC's North American revenues. Roseanne Mendoza, executive editor of its successful Lifelong Books group, reports, "For each of these book programs there's a market and there are government funds. We've published in order to capture these funds." A Teacher Resource series is SF's response to the 10% of federal monies going to the states and targeted for teacher training.

Mendoza is convinced the market is growing all the time. She foresees continuing growth in the marketplace due to new ranks of immigrants, other people who have been through the school system but are still deficient, and those moving out of ESL and into more advanced learning.

"We never publish in a vacuum," says Mendoza. "We rely on field experts in the area to fill us in on the needs out there."

One of the most recent titles announced for the Lifelong Books series came to her through the State Department. She received a letter from Jim Parker of the federal Department of Education with a list of federally funded adult literacy projects. She indicated those that interested her and he sent information on the projects carried out through government grants. Materials producted by a State of Florida adult education demonstration project grant awarded to Florida Atlantic

Industries Now Addressing Literacy as Part of Business

The trade associaton for the Graphic Arts Industry, the National Association of Printers and Lithographers (NAPL) started its own literacy program after an industry-wide basic skills survey turned up some serious deficiencies. A press release reports, "Far and away the most frequently reported problem attributable to poor basic skills was misinterpretation of job orders. Nearly half (49%) of the survey participants listed employees' inabilities to read, interpret, and process job orders correctly as a basic skills-related production problem. Other areas of concern as noted by the respondents include lack of skilled entry-level people, press spoilage, bindery/finishing spoilage, mistakes in shiping destinations, and avoidable downtime and wrong impositions."

Before this winter, NAPL expects to have a fully tested program available to its 3700 industry members, which represent some 90,000 professional workers in the U.S. and Canada. This comprehensive workplace skills training effort is aimed primarily at employees currently working in pressrooms, binderies, prepress faciities, and materials handling areas. The curriculum is deisgned to be both job specific, based on employee needs and job requirements, and to promote career advancement from within.

Time Warner is one publishing/communications group using its own resources to advance literacy as well as its own commercial interests—selling magazines.

In 1985 Time Warner launched "Time to Read," and developed an instructional and tutor training program using *Time*, *Sports Illustrated*, *People* and other publications as the core curriculum. The program began at four sites and has expanded to 66 sites in 27 cities, with nore than 1000 tutors and 1500 learners. A key element of the program is that it is carried out in full partnerships with local business, community organizations, public agencies and other groups. Volunteer tutors, trained by Time Warner, hold their classes in schools, prisons, libraries, worksites, and other appropriate places. A recent independent evaluation of the program shows that seven out of every 10 learners completes the program, that the Time Warner magazines have proven to be effective teaching tools and provide a strong cultural context. Nearly eight out of 10 learners so far have shown marked reading improvement.

The American Newspaper Publishers Association and its foundation have been recognized by Barbara Bush for their active participation in literacy for several years. Over 300 newspapers now conduct literacy programs in their home cities, and some have invested millions in the effort. The *L.A Times'* and *Chicago Tribune*'s far-reaching programs are among the largest. Arthur Ochs Sulzberger chairman of the *New York Times*, served as the Chairman of the ANPA Foundation in 1989.

The International Association of Business Communicators (IABC), an association of more than 11,000 corporate communication and public relations professionals, recognizes this and has put together a literacy program. Its two major thrusts are to help local local chapters assist local literacy programs, and to help IABC members build awareness within their own companies of literacy issues. In November, IABC's Communicators for Literacy Action Committee issued a guidebook with suggestions of how to form local partnerhsips. —B.P.

University were selected. Scott, Foresman asked permission to work with the author to develop these materials and publish them as a model for the nation. "The program is doing very well so far," says Mendoza. "It's just been announced, and there seems to be a great deal of interest."

Chapter I is the largest program grant catalogue of the U.S. Department of Education, at $5.358 billion in 1990. The major portion of these monies earmarked for poor families—$4.7 billion—went to school districts, but some Chapter I monies are finding their way into family literacy. Based on evidence that reading levels at school rise when parents are involved in reading in the home, two years ago the program set new procedures, with emphasis on parents' involvement. As a result, teachers demonstrated a tremendous need for materials to help reach parents.

Scholastic brought out its Parent Book Bags program for grades K–1. Gare Thompson, editorial director for the school market, reports that the response from teachers has been great. "Although it's just been launched and it's therefore too soon to tell actual sales, the feedback we're getting is better than expected. Everyone seems to be searching for ways to reach parents and this looks like an answer."

Other Government Partnerships

Garrett Murphy recommends that publishers interested in entering partnerships for literacy co-ventures look at technology first, "especially audio reinforcement; we never had this before."

The national Workplace Literacy Program of the U.S. Department of Education awarded $21.4 million in grants for 76 workplace literacy projects in 1988 and '89. 1990 grants totaled $19.7 million and the same level of funding has been approved for 1991. These grants cover 70% of project costs and are directed to partnerships involving at least one private sector employer, union or business, and one education organization. Murphy suggests publishers look at the Contact Literacy Database being put together nationally on work force literacy. Then he adds, "In New York State alone there are 10 brokerages called Regional Centers for Economic Development. For business and industry, they are the point of access into the educational community." □

Washington Fumbles the Ball

BY HOWARD FIELDS

The idea was grandiose: end illiteracy in America by the end of this century, primarily with a $1.5 billion influx of federal funds and coordination of several competing federal efforts over the next five years. The result was disappointing: even watered-down enabling legislation failed to pass.

When Congress reconvenes in January, one of the first bills expected to enter the hopper on the Senate side is another bill by Sen. Paul Simon (D., Ill.) to start the process all over again. Also starting over again will be many other pieces of legislation that often include some funds or programs to fight illiteracy.

Despite the loss already of one-tenth of the time that was to be allocated for that massive, decade-long fight, several literacy promotional efforts continued apace, including the one carrying the name of First Lady Barbara Bush. Existing literacy programs squeaked through the legislative mill in the final days of the session, and many of them received increased funding over the previous fiscal year.

As originally introduced, Simon's bill envisioned pulling together all the disparate federal anti-illiteracy efforts into one coordinated effort.

By the time the bill won Senate approval early last year, it was diluted to a $50 million, one-year program with a limited reach. The House never got around to taking action on educational programs, so its literacy activities got included in the annual appropriations bill for Education. Those activities became just pieces of $7.5 billion worth of miscellaneous programs included in a package finally worked out by House and Senate conferees.

Of that total, $1.2 billion, an increase of $2 million over the previous fiscal year, was earmarked by the conferees for vocational and adult education, of which literacy spending was only a small part.

More important to the literacy battle, the compromise included a huge increase in the Even Start program. The $49.8 million appropriated represented an increase of $15.5 million over the previous fiscal year.

One of the elements that barred an agreement was a House desire to establish a National Institute for Literacy, with freedom to do research, evaluate government policy, provide assistance to various literacy programs, and serve as a clearinghouse for information. The Senate wanted more direct oversight, and would have included members of Congress and members of the public on a board of directors to oversee the activities of the interagency council.

There were other disputes about the legislation, but if the next Congress, which takes its collective seat Jan. 3, picks up where the old left off, compromises could be worked out early in the session and the bill passed. Since, however, Congress is widely believed to be a model for Parkinson's law that says work expands to fill the time available, literacy legislation could be delayed into the next term.

As he watched his ambitious bill get whittled down on the Senate floor earlier this year so that it could garner the support of a majority of his colleagues, Simon said it would still allow the United States to eliminate illiteracy by the end of the decade if it follows through with other supportive actions. The reality was that in the form in which it passed, it would not have the muscle to do what literacy advocates and professionals have been pushing for several years: bring some cohesion among all of those supportive actions.

Both houses appeared to agree on the need for a family-oriented book program. The Senate bill included the Books for Families Literacy Act of 1990, which would have included the RIF book-distribution program. The House would have expanded the types of children to be covered by the RIF program and would have required the organization to report to the Education Department on its efforts.

Congress may have dropped the ball this year in solving the problem of coordinating all the literacy efforts, but the Barbara Bush Foundation for Family Literacy got a start in that direction when it made its first grants after collecting $5 million in donations. Its first 11 grants, totaling $500,000, were given to recipients who promised to work with various groups, including immigrants, homeless people and migrants.

EDITED BY DIANE ROBACK

Bookstore Survey: Zeroing In

Heidi Younger

In our second in-depth look at children's bookselling, we take a closer look at how children's books are ordered, displayed and sold in the stores, and who is buying them

BY DIANE ROBACK

This survey was conducted by the Cahners Research department in September 1990. Questionnaires were sent to 700 Publishers Weekly *subscribers, 50 chain bookstores and 350 bookstore members of the Association of Booksellers for Children. In total there were 328 respondents, for a response rate of 30%. We followed up the survey with a phone poll of our own, talking with general, children's and chain booksellers about some of the issues raised in the survey.*

Additional reporting by Janet Schnol.

Of the bookstores that participated in the Cahners survey, 39.6% were general independent stores, 31.2% were children's-only stores, 9.4% were specialty independents, 5.5% were college stores, 4.2% were national chains, 3.9% were regional chains and 6.2% declined to specify or answered "other."

Last year, in our first-ever survey on children's bookselling (*PW*, Nov. 24, 1989), we documented an impressive commitment to children's books in this country on the part of retailers. The number of children's-only bookstores multiplied throughout the last decade, and many general bookstores expanded their children's sections, as demand grew and potential profit became clear. The picture of children's bookselling that emerges from this year's survey is similarly bright, with good signs for the coming years, but it is beginning to change in several ways.

The amount of space that children's books occupy in children's-only stores is slightly larger than last year: a mean of 1181 sq. ft., up from 1099 sq. ft. This new figure represents 79.5% of the stores' total selling space, with just over 20% devoted to products such as toys, audiotapes and other sidelines.

General independent stores devote an average of 21.4% of their selling space to children's books, up from 20.3% last year. And the average space devoted to children's books in these stores, 541 sq. ft., is up almost 9% from last year's figure of 482 sq. ft., indicating an appreciable expansion in this category. Chain bookstores devote an average of 416 sq. ft. per store to children's books, constituting 17.6% of total space.

On the average, children's-only stores had total gross sales and revenues for children's books of $202,093 in 1989, an 8.1% increase over 1988. This makes for a sales per sq. ft. figure of $171 per sq. ft., up 8.7% from last year's total of $149 per sq. ft.

Gross sales of children's books for other independent stores was $59,653, but this includes many stores (20% of total) that sell less than $5000 worth of children's books per year. If these stores are removed from the calculations, the figure rises to $71,170. Although average figures per outlet were not available for Walden and B. Dalton/Barnes & Noble, their chain-wide totals averaged $2,618,750; for regional chains, the figure was $82,045.

A smaller percentage of children's-only booksellers than last year (15%, down from 18%) planned to expand their stock of children's books over the next 12 months. Some store owners pinpointed the downturn in the economy as the reason they don't plan to grow; others said they don't need more space right now. Those who have opened children's bookstores within the last few years were more likely to say they needed to expand than their more established counterparts.

Chain bookstores are planning more of a stock increase than reported last year: 20%, up from 15%, while the percentage of general stores planning to increase their children's sections is exactly the same—21%. For all stores that reported plans to boost their stock or display space of children's books, an increase of 16% was the mean.

By and large, national chain stores carried the largest average of copies per title of all categories of respondents: 6.6 copies, vs. 4.6 for children's-only stores, 3.7 for regional chains and 2.8 for general independent stores.

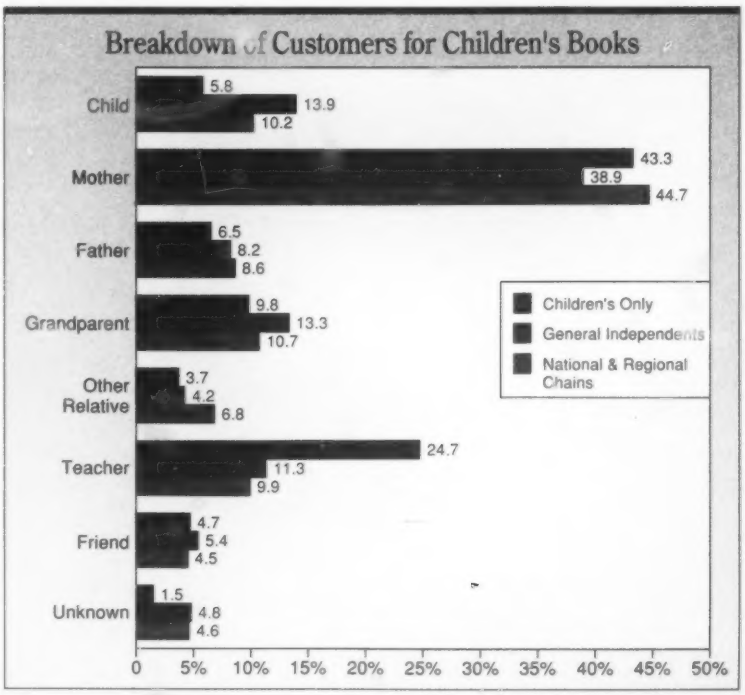
Turning Back to Frontlist

What these stores stock is changing as well. Two-thirds of the inventory, for all stores in the survey is backlist, and one-third is frontlist, hardly a surprising statistic, since the bulk of the children's book business is in backlist sales. Children's-only stores had the highest percentage of backlist titles (71.1% of stock), followed by general independents (with 66.9% backlist stock) and chain bookstores (63.5%).

But stores in all categories report a slight decrease over last year in the percentage of backlist carried, and a concomitant increase in frontlist. Adrian Sweet, owner of Children's Books on Broadway in Long Beach, Calif., observed, "People come in looking for new things; they own a lot of backlist titles already. And the reviews they read are for new books." Debora Kick, general manager and buyer for Gordon's Booksellers for Kids in Baltimore (a new store in the Gordon's chain that opened in May), said that children's frontlist is stronger throughout the Gordon's stores "because there's more of a market. We're selling more frontlist hardcover authors and illustrators with definite followings. People don't want to wait for the paperback—it wasn't like this in years past. Even our stores that don't usually sell children's hardcovers are now moving them." But for Suzanne Swift of Kids Books & More in Carrollton, Tex., "Our backlist is still stronger. Frontlist takes lots of handselling, and people mostly like to come in and buy what they know."

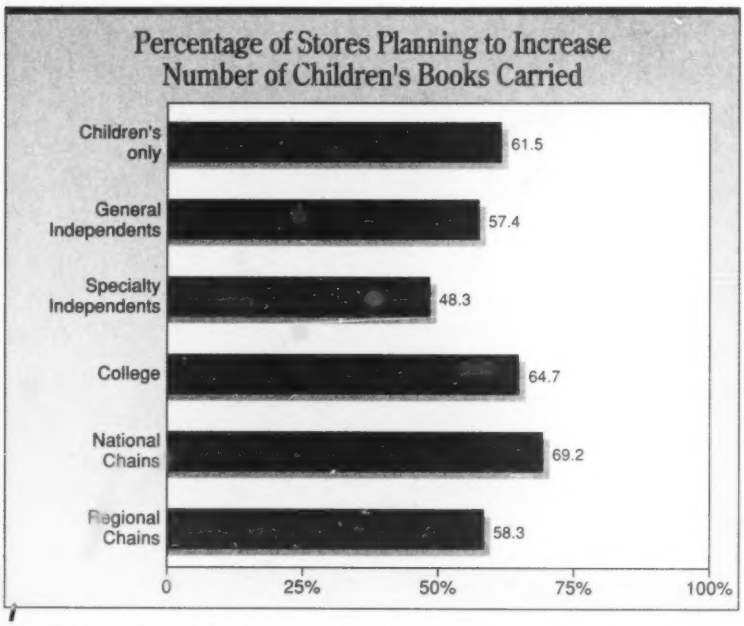
Some booksellers cited an increase in quality as a major factor in greater frontlist representation; others pointed out that many backlist classics have been repackaged into new editions, essentially becoming frontlist titles all over again.

Stores also reported carrying a higher percentage of hardcover books, reflecting the strength in the hardcover picture book market. Children's-only stores carry the greatest percentage of hardcovers (43.1%, up from 40.7% last year), followed by chains with 46.2% (up from 40.8% last year) and independents with 38.9% (exactly the same as last year). Booksellers find that hardcovers are greatly preferred by customers giving gifts. In addition, according to Barbara Theroux, owner of Fact & Fiction in Missoula, Mont., "I probably sell as many children's books to adults to give to adults as to children," indicating that the strong



crossover market for children's books is a factor here. By and large, children's booksellers did not seem concerned by rising hardcover prices, saying that the increase in cost of children's books by no means rivals the price increase for adult books in recent years.

Without exception, picture books was the category most in demand in every type of store we surveyed. For children's-only stores, the no. 2 category was books for beginning and younger readers, followed by nonfiction, then books for middle readers. In chain bookstores, the no. 2 category was series books (way down at no. 6 in children's stores). And only a small number of chain stores (8% of total) reported heavy demand for books for younger readers. Books on multicultural issues were reported as having strong demand by only 4.5% of respondents.



Booksellers of all kinds named nonfiction as the top category in which customer needs are *not* being met. This edged out books on problems and special issues (the top category last year), now down to no. 2; the no. 3 category was biographies and autobiographies.

A Customer Profile

It's often difficult to know who the actual customer is for children's books, so in our survey we attempted to obtain a more accurate picture (see chart, p. 37). In all varieties of stores, mothers were far and away the top customer category (representing 40% of all customers). The no. 2 category for children's-only stores (and for no other category of stores) was teachers, representing almost 25% of the total. This figure makes it clear that children's booksellers are increasingly doing business with local schools (see chart, p. 44). For general booksellers, the no. 2 category of children's book customers was children (13.9%), followed very closely by grandparents (13.3%). This order was reversed in the chain stores, where 10.8% of customers were grandparents, and 10.2% were children.

Several facts emerge from these findings. The number of unknown customers was much smaller in children's-only stores, indicating these booksellers have a better knowledge of who their customers are than other kinds of booksellers. And the percentage of fathers buying books for their children was quite small, in all types of bookstores. Greenie Neuburg, children's book buyer at Wit & Wisdom Booksellers in Lawrenceville, N.J., commented, "Maybe wives do more reading to their kids—this might go under the category of buying food: 'Mom knows best.' There's still an attitude that nurturing is the mother's responsibility." Suzanne Swift at Kids Books & More offered a practical explanation: "Our store closes at 6 o'clock, and a lot of dads aren't home that early. Saturday is a two-parent day. But when fathers do come they spend more than mothers." They're not *always* model customers, however, Swift pointed out. "Dads are worse than the kids," she said. "They play with all the toys."

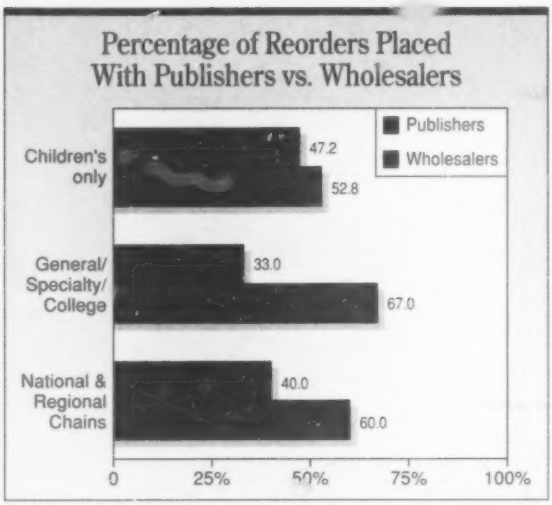
Displaying the Wares

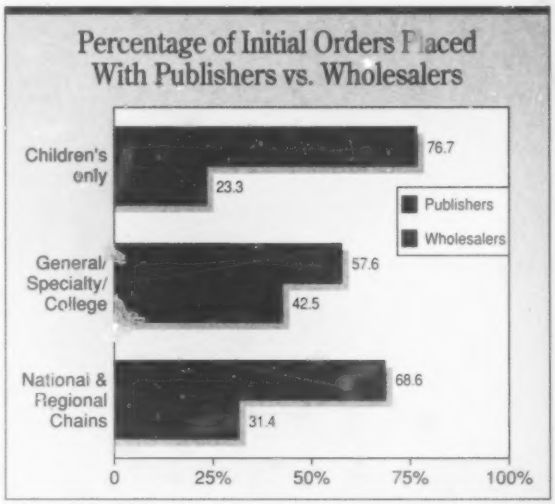
Three-quarters of the children's stores have a specific place designated for new releases, as do 68% of the chain stores and 60% of the other independents. The average display time for new releases in all stores was six weeks. Most display areas for new releases allow booksellers to face out the titles, which move to spine-outs when they are mixed in with the regular stock. This six-week display time average arises out of necessity, retailers say, because of the constant flow of new books arriving. "Some books get displayed less than that [the six-week average]," said Suzanne Swift. "We have to shift display stock depending on what comes in." According to Margaret Nevinski, children's book buyer at the Elliott Bay Book Co. in Seattle, "We may keep our books out a little longer than six weeks. If a new book is selling well, I'll keep it out there, and keep refilling. And the Newbery and Caldecott winners stay out all year."

Children's-only stores tended to keep new books on display longer than general independents (6.2 weeks vs. 5.9 weeks), and much longer than chain bookstores (national chains 4.8 weeks, regional chains 4.9 weeks). And college stores showed the least resistance to the temptation of new titles, keeping the books on display for an average of 8.2 weeks.

Children's and chain booksellers were almost equally apt to use publishers' point-of-purchase displays: 70.8% of children's stores said they use them, and 68% of the chains, compared to 56.6% of general booksellers. Across the board, booksellers said they use point-of-purchase materials for just under 10% of the children's books they carry, with the chains at a slightly higher percentage (10.7%).

We polled booksellers on what their most effective in-store promotions for children's books were. For children's stores, author signings and readings were the no. 1 category; for all other kinds of stores, the top slot went to in-store displays. The no. 2 promotion for children's





bookstores was storytelling, a category that was insignificant for other types of stores. In chain stores, the second most effective promotion was sales and discounts.

For children's booksellers, newsletters are often an essential method of advertising as well as disseminating information about new titles and store promotions. Three-quarters of all children's stores said they publish newsletters, as compared to 35% of general bookstores. Those general bookstores with newsletters devote on the average 24.9% of the space within the newsletter to children's books.

'Where the Markup Is'

In the bookstore business, sidelines are a popular and profitable addition to a store's stock, and they play an important role in the offerings of children's-only stores as well. Sidelines are attractive because they enhance the product mix, enabling booksellers to offer a wider variety to customers (a typical comment was "We carry them because it's nice to have extra things for our customers," in the words of Cathie Sanford of Black Forest Books & Toys in Charlotte, N.C.). Many sidelines carry a larger markup than books do, thereby increasing the profit potential.

Carol Wynne, owner of the Children's Book Cellar in Waterville, Minn., where two-thirds of the store's selling space is devoted to books, commented, "This is a relatively small town, and we couldn't survive with just books. The other items we carry are compatible with books, though, such as educational toys and games." Adrian Sweet of Children's Books on Broadway said she carries sidelines because "that's where the markup is"; 25% of her space is sidelines, but only "book-related items." And Suzanne Swift of Kids Books & More has found sidelines "more profitable than books. They pay for the books we want to have in the store."

Only 1% of all children's stores surveyed said they do not carry any sidelines, as opposed to 8% of the chains and 13.3% of all other stores. And general booksellers tended to carry fewer children's sidelines, not surprisingly. Barbara Theroux at Fact & Fiction doesn't carry them "because customers don't demand them. In the beginning we had a mix, and our clientele wasn't too interested. There are other outlets in the area for those things." At Elliott Bay Book Co., audiotapes are available but no other children's sidelines, according to Margaret Nevinski. "They're part of the cassette display we have at our front counter. It's small—not a major thing. Our emphasis is primarily on books. Also, there are three toy stores in this neighborhood, so it probably wouldn't be profitable for us." Indeed, most of the booksellers who don't carry sidelines told *PW* that they would rather devote the selling space—since it's rather limited—to books.

A whopping 91.7% of children's-only stores said they carry audiotapes, by far the most popular sideline in this category of stores. The next most popular sidelines were bookmarks and bookplates (carried by 74% of children's stores), dolls based on book characters (72%), rubber stamps (72%), greeting cards and paper products (69%), educational games (58.4%) and toys (58.3%).

For general independents and chains, bookmarks and bookplates were stocked by slightly more stores than audiotapes (67.2% vs. 64.8% of independents; 76% vs. 72% of chains), though audio was the no. 2 category for both kinds of stores. After that, for independents: greeting cards (carried by 42.6%), dolls based on book characters (40.2%), educational games (33.6%), toys (32%), magazines (25.4%) and rubber stamps (19.7%). For chain stores: greeting cards were tied with magazines (both carried by 44%), followed by educational games (36%), dolls based on book characters (32%), toys (16%) and rubber stamps (8%).

Asking booksellers how many titles they carried within a few sideline categories revealed children's booksellers commitment to breadth of stock. Children's-only bookstores stocked an average of 119 book-and-cassette sets, compared to 42 for general independents and 39 for chains. They carried 125 audiotapes, vs. 35 for general independents and 22 for chains, and 50 videotapes, vs. 17 for general independents and 14 for chains.

Seeing Reps—and Placing Orders

Children's-only booksellers were visited by publishers' reps much more frequently than any other category of bookseller. They reported that 61.4% of the publishers they buy from send reps to their stores, as opposed to general independents,

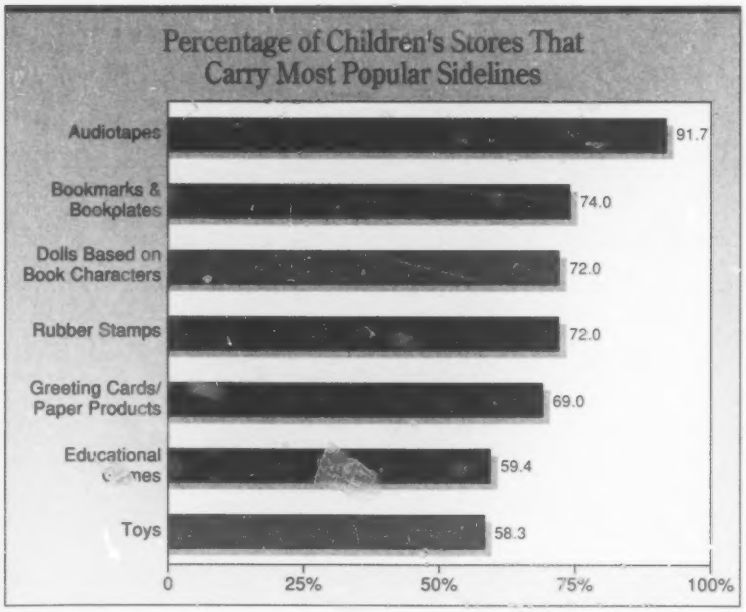
who said they only see reps from 50.6% of the publishers; national chain stores reported visits from 48.4% of the publishers; and regional chains 35.9%.

It stands to reason, then, that of all categories of stores surveyed, children's stores placed the highest percentage of their orders through a sales rep: 58.5% of all orders, compared to 54.9% for chains and 53% for general independents. Children's-only stores also place more of their initial orders with publishers (76.7%, as compared to 23.3% placed with wholesalers). Other independents purchase 57.6% initially from publishers, 42.4% from wholesalers; chains purchase 68.6% from publishers, 31.4% from wholesalers. For reorders, 47.2% of children's stores go to publishers, vs. 32.8% of independents and 40% of chains.

Children's booksellers cited several reasons they are more inclined to order directly from the publishers than general booksellers are. Most said they insist on actually seeing books (especially picture books) before ordering them, a feat not accomplished with catalogues, but by sitting down with a rep. According to Denise Herzberg, co-owner of Pooh Corner in Madison, Wis., "Reps bring galleys, and we won't order without seeing them." When not reordering in quantity, booksellers said it's to their advantage to deal with publishers rather than wholesalers, for better discount. Greenie Neuburg at Wit & Wisdom pointed out another salient issue: "General booksellers deal with so many more publishers than children's booksellers that they don't have the time to work with them on an individual basis. They *need* to go to wholesalers." But then again, so do children's booksellers with less-than-central locations, such as Carol Wynne of the Children's Book Cellar. "We're in central Minnesota, and it's a good trick to get reps to come here. So I'd rather get books from a distributor." Margaret Nevinski in Seattle agreed that geographical location often plays a part in where a bookstore orders from. "On the West Coast, it takes longer to get books," she said, "so a distributor is helpful."

Neuburg had a lot of praise for "the great job wholesalers are doing these days. They're increasing the number of children's titles they're carrying," enabling booksellers to order fewer titles initially, and fill in stock from wholesalers on demand. Suzanne Swift reported that her store was also carrying fewer copies per title—1's and 2's rather than 3's and 4's—because she preferred to carry more titles overall rather than have a single title take up a lot of space.

Reorders from chain stores are increasingly going to publishers, a trend corroborated by Gordon's Debora Kick. "Until the last four years," she said, "we found that faster turnarounds came from distributors. Now, in the last year or so, free freight and publisher offers have helped [tip the balance]. Also, publisher warehouses seem to be functioning better."



Using Co-op Dollars

Co-op money is used by 58.3% of all children's bookstores; only 28% of chains use it, and 28.7% of general independents. The top use for co-op money is for advertising; for children's stores and for chains, the no. 2 use is for newsletters; for other independents, the second use is a tie between catalogues and in-store events. Children's stores use co-op money an average of 3.8 times per year; other independents use it 4.1 times, and chains use it 7.1 times (this incorporates non-children's co-op usage as well). "We use everything we can," states Debora Kick of Gordon's. But the general booksellers we spoke with didn't consider it a priority to spend co-op dollars on children's books. "Children's titles tend to advertise themselves," said Fact & Fiction's Barbara Theroux, "and people tend to find out about children's books on their own. In delegating co-op dollars, it doesn't feel necessary to re-advertise children's books." And Margaret Nevinski of Elliott Bay questioned the effectiveness of ads for children, "because so much is based on handselling, as opposed to big-name adult authors that people will come in and ask for, after seeing an ad."

Booksellers of all types, when asked how co-op money might be made easier to use, urged publishers to simplify and standardize terms and forms. They also requested more information on co-op availability, as well as quicker response time from publishers.

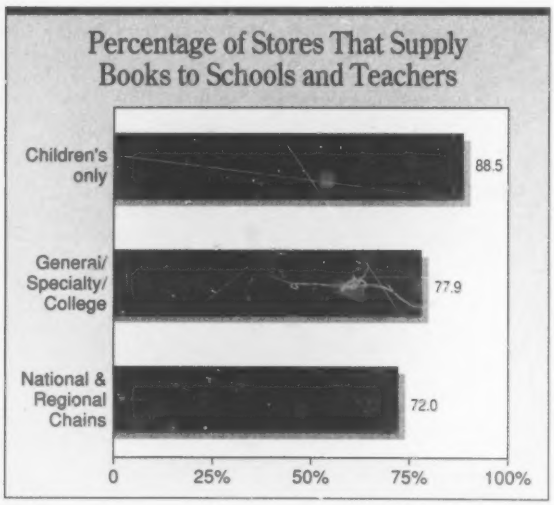
Working with Teachers

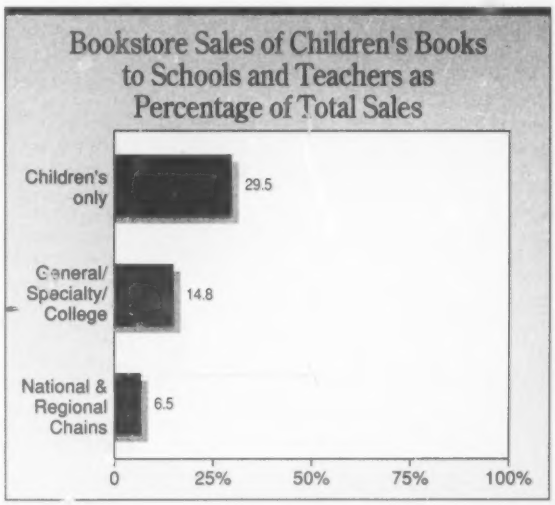
An overwhelming percentage of children's-only stores—88.5% of the respondents—supply books to teachers and schools. These stores do an average of 29.5% of their business this way; roughly 15% of the stores do over 50% of their business with schools. The whole-language movement, in which reading is taught with trade books rather than with basal readers, is spreading throughout the country, and children's booksellers are playing a part by reaching out to their local teachers, providing information on avail-

able titles and suggesting ways the books might fit into school curricula. In the area surrounding her store, Suzanne Swift says, "Schools are catching on to whole language. But teachers have to pay for the books out of their own pockets, so it's not a huge amount of sales to them. But each year it's getting better."

In return for time spent helping teachers select books, a bookseller might well expect that the school's order would be placed at the store; many children's booksellers are complaining bitterly, however, about competition for this business from local wholesalers. They claim that they are spending hours with teachers, only to find that the school then places the book order with a wholesaler, which can offer the district a few extra discount points.

Just under two-thirds of children's stores surveyed hold book fairs, as opposed to 25% of other independents, and only 8% of the chains. Of that two-thirds, the stores do on the average 16% of their business this way. Clearly this is an area of potential profit, but one that requires an extensive time commitment (and precious storage space). Gordon's Booksellers for Kids's Debora Kick states that book fairs aren't profitable for chains to run. "Chains don't have someone who specializes in that," she pointed out. "It takes a lot of time to do bookfairs. Children's-only stores would be more likely to be able to afford the time."





Booksellers Turn Thumbs Down

In our survey, we asked retailers if they would be interested in seeing more video sales presentations and telemarketing. The answer was a resounding no. Two-thirds of all respondents said they would not be interested in seeing more video presentations, and three-quarters voted down increased telemarketing. Over and over again, booksellers said that they need to put their hands on children's books to make their buying decisions, and many reported an aversion to being interrupted by telemarketing calls. "Without being in our store," Barbara Theroux at Fact & Fiction maintained, "reps can't get a feel for our needs and for our area, which is necessary for a sale." Adrian Sweet at Children's Books on Broadway said she doesn't mind telemarketing followup, but dislikes it for an initial call. And Wit & Wisdom's Greenie Neuburg believed that telemarketing hasn't been used to its full potential. "For example," she said, "reps should call stores when a title gets a good review or is going to be a bestseller, to alert them."

Asked if they would prefer the ordering option of a deeper discount with a non-returnable option, 67.7% of children's bookstores and 70.7% of other independents said yes; only 36% of the chains said yes. Children's books, with their relatively low return rate (though this has begun to grow in recent seasons), are a natural for this kind of arrangement, and independent booksellers seem eager to try it, if publishers were to offer it. Chain stores were much less enthusiastic; in Debora Kick of Gordon's Booksellers for Kids' words, "independent and children's-only booksellers have the ability to handsell, and they would have a better feel about what they can sell in such quantities. We can't know if there will be someone to make a specific title move."

More than half of all respondents (55.2%) said they would be able to sell a non-jacketed picture book for a lower price, if it were offered by a publisher (there was no significant difference in response among store categories here). Those in favor of the idea mentioned the advantage of having a jacket that would not rip, and the potential of increased sales if a book had a cheaper cover price. Others didn't think the plan would work. "I don't think a book looks as nice without a jacket," said Suzanne Swift of Kids Books & More. "If it's only a small percentage of the price, I don't think the cover is worth losing." And still others felt that a dollar or so off the list price would not make much of a difference in sales.

Looking ahead, all signs look good for the next decade, according to Caron Chapman, executive director of the Association of Booksellers for Children. Chapman believes that "a solid foundation has been laid for high-quality children's books to be written, published, distributed and used in this country. We have lots of green lights—the baby boom shows no sign of ending, the value of books in the family is definitely still there, certain areas of the country are still growing, teachers want materials. It's still a wide-open possibility for a small business to provide the service of supplying books to children." □

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